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UED MONTHLY BY OFFICE OF FOREIGN AGRICULTURAL RELATIONS

UNITED STATES DEPARTMENT OF AGRICULTURE • WASHINGTON, D. C.

New Zealand's Agricultural-Marketing Policies

by **MAURICE WRIGHT***

New Zealand is smaller and farther removed from the mother country than any other British Dominion. Its position in world trade, however, is far more important than is indicated by its size, location, and population. Being a large supplier of livestock products to the United Kingdom, and offering an important market for British manufactured products, New Zealand has more foreign trade per capita than any other nation. Since the United Kingdom takes 80 percent of its exports and supplies about 50 percent of its imports, imperial ties are strong. Reflecting an attempt to protect the outlet for surplus animal products in the United Kingdom, New Zealand's agricultural policy in the inter-war years moved toward increased state control of marketing. The measures employed by New Zealand were not used, however, to raise prices of commodities for export substantially above world levels.

Wartime bulk-sales agreements with the United Kingdom have resulted in a general extension of state marketing to all the major export products. The recent announcement of a new agreement covering the sale of surplus meat and dairy products to the United Kingdom until mid-1948 assures the New Zealand producer of a market through the early postwar period and may influence the development of future marketing policies.

Farm Resources, Production, and Market Outlets

New Zealand's concentration of productive effort on a few major products to be marketed largely overseas and its dependence on the importation of manufactured goods make its domestic economy highly sensitive to world price conditions. This situation is made more acute by heavy reliance on one export market. For example, in 1939 New Zealand shipped 99 percent of all the meat and cheese exported, 98 percent of the butter, and 56 percent of the wool to the United Kingdom, which took that year about 81 percent of New Zealand's total exports, excluding specie and ship stores. Imperial preference in the United Kingdom market and protectionist policies followed by other countries that were potential markets for New Zealand products were partly responsible for this dependence on the United Kingdom market.

The decline in world prices of agricultural p ucts in the early 1930's had severe repercussio the New Zealand economy. The present agricul policy largely reflects an effort by a predomin agricultural exporting nation to cushion against the shocks produced by drastic fluctu in world price levels. Bilateral and state tra imperial preferences, and import and exchang strictions have been resorted to, not from aggr nationalistic motives, but for the purpose of ins ing an exporting economy from the effects o instability of prices in the world market and t restriction policies of other nations. An unders ing of factors leading to controls affecting i national trade, necessitates a brief review of Zealand's physical resources, conditions of pr tion, and the historical development of those con This study attempts to show the factors that been particularly influential in the developme the Dominion's marketing policies.

PHYSICAL BASES OF NEW ZEALA ECONOMY

Grass is New Zealand's greatest natural reso Dairying and pastoral enterprises that produce and meat are the basic industries. The country few industrial resources other than agricultural a small working population.[1] The value of production is more than 60 percent of the valu production for all purposes in New Zealand; estimated to be about 50 percent of the total nati income from all sources (table 1).

New Zealand's soils, even the poorer ones, bec of the comparatively mild and equable weather ditions, produce some of the world's highest qu pastures. While a detailed examination of soil files throughout New Zealand has never been m the soil types in the main agricultural areas known (*1*).[2] The most important types are Podsols and incompletely developed Podsols in heavy rainfall areas, a soil low in organic ma but high in soluble salts in Central Otago, poss some Chernozem soils in Marlborough, and skel soils in the mountainous and volcanic areas. M

*Office of Foreign Agricultural Relations.

[1] Total population was estimated at 1,630,000 in 1941.

[2] Italic numbers in parentheses refer to Literature Cited, pag

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Zealand soils are acid in reaction and are leached
e bountiful rain. Consequently, lime and phos-
es are applied to much of New Zealand's pasture
with beneficial results.

1.—*Value of production in New Zealand, 1929–30 to 1939–40*

[In N. Z. pounds sterling]

ust-year	Agricultural	Pastoral	Dairy, poultry, bees	Total farm	Total, including all other industry	Percent farm of total
	Million	*Million*	*Million*	*Million*	*Million*	*Percent*
9-30	9.1	36.1	28.4	73.6	120.5	61
0-31	8.8	24.6	22.2	55.6	97.2	57
1-32	8.0	19.3	21.9	49.2	83.3	59
2-33	8.9	20.4	21.2	50.5	83.7	60
3-34	8.7	32.1	22.5	63.3	98.4	64
4-35	7.9	28.3	23.0	59.2	96.7	61
5-36	9.2	34.5	28.8	72.5	113.8	64
6-37	8.8	47.1	32.7	88.6	135.3	66
7-38	8.6	40.7	33.8	83.1	134.5	62
8-39	9.2	37.4	33.8	80.4	133.9	60
9-40	10.1	38.4	35.9	84.4	142.8	59

The average monthly exchange rates for the New Zealand pound during ust-July season averaged $4.86 in 1929–30 and 1930–31 or about 91 percent yearly average for the pound sterling. Beginning August 1931, because drop in the rate of exchange for the United Kingdom, the rate for New also dropped and averaged $3.46 in 1931–32 and $3.07 in 1932–33. During because of the devaluation of the U. S. dollar, it averaged about $3.97 ained somewhat below $4.00 each year until, influenced by the out- f war in 1939, it dropped to $3.78 in 1938–39 and to $3.09 in 1939–40.

iled from NEW ZEALAND OFFICIAL YEAR-BOOK (*8*, pp. 773–776).

w Zealand is in the Temperate Zone and because
e small width of the country has a predominantly
ar climate (*6*). By Köppen's classification all
l areas have a cool-temperate, moist climate.
ge annual rainfall for most of the country
within the 25-to-60-inch range. Mountainous
and the west coast of South Island have a yearly
fall that varies from 60 to 200 inches. These
, except for a small section on the west coast,
rgely unoccupied.
ce the mountains tend to break up the clouds
to prevent the formation of extensive cloud
s, the percentage of bright sunshine is surpris-
high for such a moist climate. This has pre-
d the formation of peat and has given New
nd some of the world's most productive pastures.
w Zealand has a maritime climate, and the sea-
fluctuation of temperature is not great. Be-
of the mountains, the distribution of tempera-
is complex. While the summers are so cool that
nd frosts[3] may briefly occur in most parts of
Zealand during any month of the year, yet the
rs are mild—being only a few degrees cooler
summer.

ground frost is considered to have occurred when the tempera- corded by a minimum thermometer, 1 inch above the ground pen, grassed surface, has fallen below 30.4° F. Many of the frosts, however, are confined to a shallow layer of surface air. atures of 32° F. on standard screens at 4 feet do not occur the summer months in many places where ground frosts are, eless, recorded.

LAND UTILIZATION

Of New Zealand's 66,300,000 acres, 43,000,000 are occupied,[4] and little of the unoccupied area is suitable for agricultural uses. Fifty-four percent (about 23,000,000 acres) of the occupied land is unimproved and is utilized mainly for low-grade grazing. Almost 20,000,000 acres are cultivated, of which 17,000,000 acres are in sown grasses and clovers. Thus 40,000,000 of New Zealand's 43,000,000 acres of occupied land are utilized for pastoral occupations.

Sheep farming covers about 30,000,000 acres of the occupied land, and 3,500,000 acres are in dairy farms. A small area is devoted to market gardening, fruit growing, poultry farming, and nurseries; mixed farming accounts for the remainder of the occupied land. Of the total rural population engaged in farm work, over 40 percent are dairy farmers, and about 26 percent sheep farmers. The others are engaged in various kinds of mixed or specialized farming.

DEPENDENCE ON FOREIGN MARKETS.

A large part (about 70 percent) of the farm production is for export. The important export items and the percentage of their total production exported are as follows: Butter, 81 percent; cheese, 94; lamb, 96; pork, bacon, and ham, 60; mutton, 54; beef, 43; and wool, 95 percent (*8*). This specialization in the production of a few commodities for export has given New Zealand the world's highest foreign-trade figure per capita.

Animal products account for over 90 percent of the value of New Zealand's total exports (table 2). Imports consist largely of manufactured goods.

TABLE 2.—*Value of exports of animal products and of total exports from New Zealand, 1930–40*

Calendar year	Exports of animal products		Total exports		Percentage animal products of total
	Million pounds	*Million dollars*	*Million pounds*	*Million dollars*	*Percent*
1930	41.4	193.8	44.9	210.2	92.2
1931	32.1	132.5	35.0	144.5	91.7
1932	32.1	102.8	35.6	114.0	90.2
1933	37.1	126.2	41.0	139.4	90.5
1934	43.3	174.4	47.3	190.5	91.5
1935	42.6	166.7	46.5	181.9	91.6
1936	52.7	210.1	56.8	226.4	92.8
1937	62.5	248.2	66.7	264.8	93.7
1938	54.3	213.0	58.4	229.0	93.0
1939	53.7	190.5	58.0	205.8	92.6
1940	69.0	211.5	73.7	225.9	93.6

Compiled from NEW ZEALAND OFFICIAL YEAR-BOOK (*8*).

[4] Occupied land includes all holdings, whether by freehold or leasehold, of 1 acre or over, situated outside borough boundaries. This includes reserves and native lands leased to indiivduals but excludes native lands held on the communal system.

This situation is due to both the efficiency of the utilization of New Zealand's grass resources and the lack of industrial raw materials. Because resources especially suitable for livestock production are plentiful and resources for development of great industrial power are lacking, New Zealand benefits by a policy of specialization in production of animal products and the exchange of these animal products for industrial goods.

The Control-Board Movement

Various export-control boards were created in New Zealand after the 1921 depression in agricultural prices. The work of these boards differed from commodity to commodity, but all made important contributions toward improving the efficiency of New Zealand's export-marketing methods. Acting as agents for the producers, they secured cheaper freight rates, better refrigeration, and better handling and storage methods in Britain. They introduced new and improved grading techniques and, by advertising, made the British consumer aware of the high quality of the New Zealand product. Some of the boards entered the market, reduced competition among traders, and exercised complete control over the export marketing of their products. These functions have been gradually taken over by the Marketing Department until, at the present time, the principal activity of the control boards is to represent the producers in negotiations with the Government (*5* and *15*).

New Zealand's expanding surplus production found a ready market in the years preceding World War I. From the middle 1890's until 1914, world prices increased steadily, as did the consumption of New Zealand meat and dairy products in England. New Zealand farmers prospered, and there was little dissatisfaction with the conduct of marketing operations by private business.

The "war commandeer" of surplus food supplies during World War I by the New Zealand Government in pursuance of an agreement with the British Ministry of Food was the forerunner of the export-control boards and for many years greatly influenced their development. To combat the submarine menace of World War I and to ensure the food supply of the "homeland," the British Ministry of Food arranged for the purchase of food supplies by the Governments in the Dominions. Transportation, prices, insurance, and storage of the products were all organized by the respective Governments. While existing commercial facilities were used insofar as possible, a drastic change had, nevertheless, been made in structure of marketing organization.

At the conclusion of the war there was no tho but that the marketing of farm products shoul turn to pre-war commercial channels as soon as p ble. In 1919 the "commandeer" of most goods w laxed, although meat (at the request of the Dom Governments) was controlled during 1920. Th version of marketing processes to private hands scarcely been accomplished when the 1921 depre resulted in the accumulation of surplus stocks a sharp fall in prices. This produced severe criti of the marketing system by New Zealand farmin terests. Wartime control came to be associated high prices and post-war *laissez faire* marketing low prices, as cause and effect, in the minds of m producers.

The nature of the attack on the existing marke system and the remedy suggested by producer or izations is indicated in the preamble of the Meat port Control Act, 1921:

> Whereas the economic welfare of New Zealand has been adversely affected by reason of a reduction in th returns receivable by persons engaged in the business o production of meat for export, such reduction being d part to falling prices and in part to the charges paya respect of freight and other services: And whereas co ences have lately been held of representatives of the Go ment and of persons whose business is the production of for export, and it has been resolved that the public eco welfare will be promoted by the establishment of a Boa Control, with power to act as the agent of the produc respect of the preparation, storage, and shipment of and in respect of the disposal of such meat beyond New land: And whereas it is desired to give effect to the re tion aforesaid, and to provide by law accordingly: And w as it is further deemed necessary and desirable that th penditure of the Board of Control should be subject to as if it were public expenditure, and that the expenditu the Board should be guaranteed by the Government of Zealand, be it therefore enacted, etc.

The Meat Export Control Act was the first o export-control measures. The Dairy Produce trol Board was established in 1923, the Fruit Ex Control Board and the Honey Control Board in and the Kauri Gum Control (later repealed) in In 1933 the Wheat and Poultry Boards were es lished, and in 1935 a Tobacco Board was autho and set up. The last three Boards are primarily cerned with local, not export, marketing. Boards controlled New Zealand marketing prac until creation of the Marketing Department in

When grouped according to the marketing f tions performed, the Boards may be classified as cising either "limited" or "absolute" control. Meat and the Dairy Board exercised only limited

over marketing, except for a few months in 1926 1927, when the Dairy Board exercised absolute rol.

he regulation of shipping was probably the most ortant of the functions performed under "lim- control. Not only were freight-rate conces- obtained, but the conditions of refrigerated sport were materially improved in line with sug- ions by the Boards. Insurance rates and condi- were also negotiated. The Meat and the Fruit rds established grading standards throughout Zealand. The Department of Agriculture had iously set up grading standards for dairy prod- ; so the Dairy Board was not active in this field. the Boards were active in research. The Dairy rd subsidized the herd-testing movement, and the Dairy and the Meat Boards gave prizes to urage the production of a high-quality product. ll the Boards maintained London representatives. e agents did much to improve handling and stor- conditions of New Zealand products in London. ally as important was the work of the Boards in rtising New Zealand products in the English kets. This advertising campaign was undoubt- an important factor in increasing English con- ption of New Zealand produce.

Board was said to exercise "absolute control" n it took complete control of all marketing op- ions and eliminated competition among traders dealers in the product. The Meat Board never cised "absolute control." For a short time in 1926 and early 1927 the Dairy Board exercised control over exported butter and cheese. Failure he control at that time has been attributed to opposition to state control from within the Board f, as well as trade opposition in both New Zealand London; (2) the attempt to control prices in the don market when New Zealand supplied only 25 ent of the market and private interests in Lon- had available 6,000,000 boxes of surplus New land butter as an aftermath of decreased con- ption in England during the 1926 strike; and, lly, (3) the inexperience of the Board. The mar- ng of Dairy products was not again made sub- to "absolute control" until the passage of the rketing Act in 1936.

ew Zealand has a small export surplus of apples pears. The trade has been controlled, and prices producers have been guaranteed since 1927. In t years a subsidy has been necessary to maintain guaranty. The export of honey was also con- led by a Board, but no subsidy was paid.

Wheat and tobacco are normally imported into New Zealand. A Board in each case controlled internal marketing and importations. The Wheat Board, by control of imports and subsidy payments to producers, has endeavored to encourage domestic production and reduce the volume of imports, which normally total from one to two million bushels annually. Prices for domestic leaf tobacco have been fixed by the New Zealand Government, upon recommendation of the Tobacco Board, since the Board first started operating in 1936.

Empire Relations and Agricultural Policy

Empire policies are of paramount concern to New Zealand producers, since New Zealand sends over 80 percent of its exports to the United Kingdom market. The landmark in contemporary imperial trade policy is, of course, the Ottawa Conference. Convened in 1932, in the midst of depression, the conference sought to restore trade within the British Empire. New Zealand's concern at the conference was to safeguard the position of its main food exports—especially dairy products and meat—in the British market (*16*).

Under terms of the resulting agreement, the United Kingdom placed a duty on imports of butter, cheese, apples, pears, dried fruits, eggs, milk products, and honey from countries outside the Empire. New Zealand products, in general, were exempt from the duty, but, in the case of dairy products and eggs, the United Kingdom reserved the right to levy a duty after August 1935, though a preference was to be maintained. The regulation of the importation of meat into the United Kingdom by a quota plan, with provision for the protection of the position of the Dominions in the trade, was established.

The United Kingdom duty on dairy products from non-Empire countries did not result in a greater absorption of New Zealand products in the market. The amount of butter and cheese entering the market from foreign countries did not decrease, and the British demand for New Zealand butter and cheese did not increase until the beginning of rearmament in 1936. About the same time, the guaranteed-price plan for dairy products was introduced in New Zealand. Increased advertising and centralized marketing control, as well as imperial preference, appear to have brought the New Zealand butter price closer to the Danish on the British market.

The United Kingdom is by far the world's largest meat importer and is New Zealand's principal market. At the Ottawa Conference, the United Kingdom indicated that its policy with regard to meat

would be, first, to protect the home producer and, second, to secure for the Dominions an increasing share of the market. This policy was implemented in Britain by a domestic program of market regulation and subsidization and by the control of imports through quotas, under which severe restrictions were imposed on imports from non-Empire countries. The reduction of non-Empire meat supplies in the United Kingdom market was largely accomplished by 1935. From that time on the main effect of the British policy was to stabilize non-Empire meat imports at the existing level.

While New Zealand was allowed an expanding share of the United Kingdom beef trade, the rate of this expansion was limited. From July 1934 until 1937, the New Zealand Government, at the request of the United Kingdom Government, regulated the shipment of frozen beef and veal so as to conform to amounts quarterly fixed by the United Kingdom Minister of Agriculture. In the operation of this scheme, it was observed in New Zealand that Australia consistently overshipped, whereas the New Zealand Meat Board was effective in regulating shipments within the allotted quotas, although thousands of additional tons were available. The United Kingdom then based new quotas upon past performance, with the result that, while the Ottawa year was to have been the base for both Australia and New Zealand, in 1935 Australia shipped 77 percent more beef than in 1932 and New Zealand shipped only 39 percent more. Moreover, New Zealand was disappointed in the small increase in mutton and lamb exports to the United Kingdom.

In 1937, the International Beef Conference and the subsidiary Empire Beef Council were inaugurated to regulate the supply of beef on the British market. Recommendations of the Council and Conference were communicated to the respective exporting countries with a view to shipments being regulated in accordance with such recommendations. While unanimous agreement was a necessary antecedent to any recommendation, the United Kingdom Government stood ready to impose import quotas when the Conference failed to reach an agreement, or to enforce compliance with Conference recommendations, or when requested by the Governments concerned. The Conference during 1937 and 1938 regulated shipments of beef to the United Kingdom from all sources, and its functions were extended in January 1939 to include mutton and lamb. The outbreak of war in 1939 and the adoption of bulk purchasing by the British Government made the work of the Conference unnecessary.

Guaranteed Prices and the Marketing Department

The Ottawa agreements, however, did not r the critical plight of the New Zealand farme Royal Commission, set up in 1934 to study condi in the dairy industry, found (*9*) that "at lea percent of the dairy farmers of the Dominion in varying degrees, unable at the present tim meet their financial commitments." The Commi also found that "Independent Boards, each conce with the marketing of one group of commoditie no longer able, as isolated units, to cope effect with the problems confronting them." It ac ingly recommended the creation of a single ce body to perform the functions of the control b and to coordinate their policies. Following recommendation, the Agriculture (Emergency ers) Act, 1934, created an Executive Commi of Agriculture "with power to regulate the keting and production of agricultural produc New Zealand." This commission functioned superseded by the new Labor Government's Ma ing Department in 1936.

A guaranteed-price scheme was an integral of the Labor Party's economic program to ins the country against the severe economic disloca produced by fluctuating world prices (*7*, p. Introduction). The guaranteed-price system, cording to the Labor Government, would be used stabilizing influence, smoothing out the farmer turns and thus sheltering the domestic economy the effects of fluctuations in overseas prices (185).

The intent of the Primary Products Mark Act is plainly indicated in its subtitle—"an A make better provision for the marketing of produce and other primary products, so as to e for producers an adequate remuneration for services rendered by them to the community." preamble declares that primary producers need protected from the effects of fluctuations in ma prices and that the most effective and appro way to secure this protection is to empower the ernment to assume ownership of products for ex at a price to be fixed from time to time and eith acquire ownership, at fixed prices, or control the and distribution of products intended for consumption.

The Act created a Primary Products Mark Department, a title subsequently shortened by la Marketing Department, under the control of a ister of Cabinet rank. The new Department

the functions of the Executive Commission for ulture, which included the coordination of the of the several Export Control Boards, the de- ment of new markets, and improvement in the ization of production and internal marketing. Department was also authorized to asume the eting functions of any Export Control Board e product was covered by the guaranteed-price m. Until the outbreak of war, the Dairy Board he only Control Board thus affected. The Dairy l remained as the voice of the producers in and other, negotiations with the Department ith the Government. It also continued to ad- ster the herd-testing system, to supply butter and cheese crates to factories, and to conduct rch of value to the industry.

though the guaranteed-price plan, as discussed e the 1935 election, was intended to apply to ts of meat and wool as well as to dairy products, s of meat and wool were more favorable, and Export Division of the Marketing Department ot concern itself with them until the negotiation he wartime bulk-purchase agreements of the ed Kingdom Ministry of Food.

finance guaranteed prices for dairy produce, count, known as the Dairy Industry Account, stablished at the Reserve Bank of New Zealand. this account the guaranteed prices and the costs arketing and administration were paid, and pts from the sale of produce were paid into it. its, whether seasonal or for longer periods, were by overdrafts on the Reserve Bank. No limit placed on the amount of the overdraft, and rovision was made for repayment. The first s deficit, however, was paid from the Govern- 's general-expenditure account, known as the olidated Fund. This mitigated to some extent nflationary aspects of the measure.

important function of the Minister of Market- was the negotiation of "reciprocal trade" or, exactly, barter agreements. The relationship ch agreements to the guaranteed-price plan has authoritatively described (*2*, p. 184):

> procedure it is proposed to follow would be through mpletion of agreements with Great Britain and other ries, under which the Dominions would be given a t by overseas countries for a quantity of butter, cheese ther primary products under a reciprocal undertaking e Dominion to utilize the credit obtained from the f our exports for the purchase of goods for importation New Zealand. . . . With agreements completed, . . . liations would be carried out between the Government he different branches of the dairy industry to fix the nteed prices.

This statment of the plan, one will note, seemed to imply that barter agreements were to be a condition precedent to the fixing of guaranteed prices. While this did not develop, Mr. Walter Nash, who held the Finance and Customs, as well as the Marketing, portfolio in the Labor Government, was energetic in efforts to negotiate barter agreements. In 1936 and 1937 Mr. Nash spent several months in Europe—both in the United Kingdom and on the Continent—negotiating bilateral reciprocal trade agreements. Discussions with the United Kingdom Government did not, however, result in an agreement.[5]

The criteria and method to be used in the fixing of the price and the amount of the price itself are of paramount concern to producers subject to a fixed-price scheme. Prices for the 1936–37 season, the first year of the scheme's operation, were to be based on the average of prices for the 8-to-10-year period prior to July 31, 1935. Thereafter prices were to be determined in accordance with the price set for the 1936–37 season and additional principles stated in the Act (*12*):

> (*a*) The necessity in the public interest of maintaining the stability and efficiency of the dairy industry:
>
> (*b*) The costs involved in the efficient production of dairy produce:
>
> (*c*) The general standard of living of persons engaged in the dairy industry in comparison with the general standard of living throughout New Zealand:
>
> (*d*) The estimated cost to the Department of marketing of the dairy produce concerned, and also the cost of the general administration of this Act:
>
> (*e*) Any other matters deemed to be relevant.

After due regard to these items, the price fixed—

> shall be such that any efficient producer engaged in the dairy industry under usual conditions and in normal circumstances should be assured of a sufficient net return from his business to enable him to maintain himself and his family in a reasonable state of comfort.

An expert advisory committee was established to recommend a price for the 1936–37 season. On the basis of the average prices prevailing prior to 1935–36 the Government's decision was to buy butter at 12.5625 pence (20.7 cents) per pound and cheese at 6.8125 pence (11.2 cents) per pound, for basic grades, with differentials for quality. When, at the end of the season, it was found that the prices offered did not afford an adequate premium for the butterfat used for cheese, an additional cheese payment of 0.25 pence (0.4 cent) per pound was made.

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[5] See (*16*, pp. 43–44) for a summary of the proposals to the United Kingdom Government and of the agreement concluded with Germany in October 1937, which increased the German market for New Zealand butter.

The 1937–38 advisory committee was the first to apply the statutory criteria in determining the price to be fixed. To determine the objective standards that should be used to interpret such phrases as "efficient producer," "usual conditions," and "normal circumstances," the committee analyzed 19,000 returns from questionnaires sent out by the Government Statistician for such factors as: Variation in size of herds, average butterfat yield per cow and per acre, the dairy-farm population, the incidence of employment on dairy farms under the heading of male and female family labor and hired labor, and the distribution of male labor according to size of herd (*12*). In addition, the Department of Agriculture made available detailed cost analyses of dairy farms and dairy factories.

TABLE 3.—*Guaranteed f. o. b. (basic) purchase prices per pound of butter and cheese in New Zealand, 1936–37 to 1938–39*

Basic-grade product	1936–37		1937–38		1938–39	
	Pence	*Cents*	*Pence*	*Cents*	*Pence*	*Cents*
Creamery butter (finest grade 93 to 93½ points)	12.5625	20.73	13.66	[1] 22.74	14.89	23.43
Cheese (first grade 92 to 92½ points)	7.0625	[1] 11.65	7.75	[1] 12.90	8.42	13.25
Whey butter[2] (first grade)	11.5625	19.08	12.66	21.08	13.89	21.86

[1] Includes adjusted payments.
[2] Whey butter is a low-grade butter and a byproduct of cheese manufacture.

Report of Marketing Department (*11*).

The final result was to increase the payments for butter to 13.25 pence (22.1 cents) and for cheese to 7.54 pence (12.6 cents) per pound. Farm opinion insisted that the raise did not cover increased production, processing, and transport costs. During the course of the year the Government tacitly approved this view by increasing the basic price for butter by 0.41 pence (0.6 cent) and cheese by 0.21 pence (0.3 cent) per pound to enable farmers to pay the wages necessary to secure farm labor and to compensate for other increases in farm costs (*13*).

At the insistence of farm groups, the advisory committee for establishing the 1938–39 prices was revised to include representatives nominated by the dairy industry as well as Government-nominated members. The committee, for the first time, published a comprehensive report of its findings and recommended that the guaranteed basic prices be increased from the previous price of 13.66 pence (22.7 cents) per pound for butter, as adjusted by the Government, to 15.605 pence (24.6 cents) and for cheese from the adjusted price of 7.75 pence (12.9 cents) per pound to 8.775 pence (13.8 cents). The Government, however, declared that such prices would result in heavy deficits which would inevitably wreck the scheme and refused to accept the committee's recommendations. The Government's de to pay a basic price of 14.89 pence (23.4 cents pound for butter and 8.42 pence (13.3 cents pound for cheese appears to have been a de compromise between a subsidy concept of the sc and a stabilization concept. (See table 3.)

Supporters of the scheme often refer to it stabilization device and point to the fact tha annual surpluses and deficits were intended o long period of time to balance. If the guara price is primarily to perform such a functio price paid to producers over a period of years mu tied directly to the proceeds from sales of the p uce. Yet the factors enumerated by law to be sidered in fixing the guaranteed price are largel factors. If the guaranteed price based upon cos ceeds the receipts from sales of the products o long period of time, the scheme becomes one of sidization rather than stabilization.

The net financial effect of 3 years of guara prices before the war was to give growers a s return and a small subsidy. The subsidy is r sented by the net loss as shown by the followin view of the 3 years' operation of the scheme. D the first year a loss of 263,900 pounds ($1,045 was incurred. This deficit in the Reserve Ban count was made up by a grant of the Govern from the Consolidated Fund. The following even after an upward adjustment in the guara price, a surplus of 573,300 pounds ($2,291,000) accumulated. A considerable increase in price the 1938–39 season was granted. Although th crease was below the amount demanded by dairy ducers, it caused a loss of about 2,515,000 po ($9,500,000) in the year's operations. (See tab

TABLE 4.—*Financial results of the guaranteed-price sche export dairy products, 1936–37 to 1938–39*

[+=Surplus; −=Deficit]

Season	Creamery butter	Cheese account	
		Cheese	Whey butter
	1,000 pounds	*1,000 pounds*	*1,000 pounds*
1936–37	−384	+126	−6
1937–38	+486	+75	+12
1938–39	−1,324	−1,158	−20

[1] Includes loss of nearly 13,000 pounds on payments for special mil ucts (1938 regulations).

Compiled from annual reports of the Marketing Department.

Internal Marketing Control

The work of the various control boards and o Marketing Department, as discussed thus far

ncerned exclusively with the marketing of New aland products abroad. In February 1937, the vernment created the Internal Marketing Division the Marketing Department to control the local disition of butter so as to give the guaranteed price producers of all butter, whether intended for local le, or for overseas markets. The work of the Divion, however, has been extended to include various grees of control over the local marketing of a wide riety of products (*14* and *17*).

UTTER

Shortly after the Internal Marketing Division was tablished, it acquired the assets, good will, and ch of the personnel of the largest wholesale but- distributor in Wellington. This firm, Picot rothers, formed the nucleus around which the trad- activities of the Division were organized. In ovember 1937, butter-marketing regulations were plied to the whole of New Zealand. An "export rity" price (that is, a domestic price estimated to ve producers a return equal to the guaranteed exrt price) was determined for butter and made comlsory at the wholesale level. Retail prices, hower, were not fixed until 1940. Manufacturers and stributors were given a distributing allowance of 5 pence (about 0.8 cent) per pound, the conditions sale were specified, and distributors were licensed. cond only to the coordination of domestic and exrt prices, the Division worked to secure a more icient distribution of butter in New Zealand. In der to eliminate wasteful duplication of services, censes to trade in butter were denied many persons ho had previously engaged in the trade. Unnecesry freight charges and cross hauls were eliminated a system of delivery zones, which forced the distrition of butter from supplies near at hand.

While the Division, through the facilities of the icot firm, engaged actively in the local butter trade, uch of it remained in the hands of certain private rms. Prices, margins of profit, grading activities, d zones of operation, however, were regulated by e Division.

In December 1941, as a result of the gasoline, rubr, and labor shortages, the Minister of Marketing lled together the nine concerns engaged in the holesale dairy trade in Wellington to devise a heme by which to give a single delivery service to tail shops in the area. A new company, Combined istributors Limited, was formed, with the old firms olding shares in proportion to the trade they had reviously enjoyed in the area. The Division became e largest shareholder in the firm. Thus, distribuon in this area is handled by a monopoly in which the Government is a minority, though the largest individual, shareholder.

EGGS

Picot Brothers had long engaged in the egg trade, and the Internal Marketing Division continued this activity. The Division was most active in buying surplus eggs during the flush season to be pulped and sold to confectioners during the winter months. This took surplus eggs off the market when they were plentiful and released them when they were scarce, thus exercising a stabilizing effect upon the market. During 1937, the Division supervised and handled the exportation of eggs from New Zealand and guaranteed a price of 1 shilling 1 pence (21.6 cents) per dozen in grading store for all eggs exported. Over the season the producer was thus guaranteed a minimum price at a net cost to the Division of 468 pounds ($1,870). The export guaranty was increased to 1 shilling 2.5 pence (22.8 cents) per dozen in 1938. Only a small quantity was shipped in 1939 to the order of the British Ministry of Food, but the Division purchased considerable quantities of egg pulp in order to maintain prices.

During the war, the price of eggs has been fixed by stabilization regulations. These were introduced by the Division in order to limit distributors' margins, provide for price differentials according to grades, control cross-transportation practices, and establish egg pools in designated marketing areas. The object of these market operations has been to ensure a maximum return to producers without raising prices. The Division has supervised the workings of the egg pools but has not, except in the Wellington area, engaged in the selling of eggs. It has acted as the agent of the armed forces in the purchase of eggs for military and shipping needs. The resulting egg shortages in areas where the Division has made heavy purchases have led to criticism of its activities.

APPLES AND PEARS

About one-half of New Zealand's average annual production of 2,500,000 bushels of apples and pears is exported in times of peace. The country has long paid a subsidy on the export of apples and pears; so, when the war sharply reduced the export trade, the apple and pear producers faced ruin. The Internal Marketing Division took over the staff and organization of the Fruit Export Board and through its facilities purchased all graded apples and pears at assembly points in the main growing areas at an average price of 5 shillings (77.3 cents) per case. The

Division has encouraged local consumption by offering each season's supply to the public at prices that would ensure large domestic absorption. Some exports, made in 1940, enabled the Division to show a small profit. The net losses of almost 470,000 pounds ($1,516,000) in 1941 and of 20,000 pounds ($65,000) in 1942 have been assumed by the Government and may be considered as a subsidy to maintain production during the war.

HONEY

While some honey is usually exported, the control of honey marketing has been transferred from the Honey Export Control Board to the Internal Marketing Division. The Division has acquired a large plant in Auckland and buys, packs, and sells honey, both locally and for export. Private producers and packers may sell in the local market, but the Division handled all exports as long as exportation was possible. The Division handles the war orders for hospitals, shipping, prisoners-of-war parcels, and the armed forces. In order to maintain supplies for these priority needs, the owners of 20 or more hives were required to market in 1943 at least 70 percent of their output with the Division.

CITRUS FRUIT AND BANANAS

New Zealand grows lemons but not in sufficient quantities to meet the local demand. There is usually a surplus during the flush season, but during the rest of the year importations are necessary. Following a heavy crop and a slump in prices in 1938, the Division in May 1939 became the sole purchaser from the producer for resale. Growers were guaranteed a minimum price of 6.5 shillings (100.5 cents), which was later increased to 7 shillings (112.8 cents) per bushel. The fruit has been pooled, and growers have also been paid bonuses of from 6 pence (7.7 cents) to 1.5 shillings (24.2 cents) each season. Lemons are purchased fresh from the tree and are then graded, colored, shrunk, washed, sized, and packed by the Division. Distribution is handled by wholesale fruit merchants who are paid a commission. The Division also controls all imports of lemons and coordinates imported and local supplies. Since early in the war, the Division has been unable to import enough lemons to meet all needs of the local market. Producers have criticized the Division for not taking advantage of this situation and selling at higher prices. Consumers, on the other hand, have criticized the Division because they considered the prices too high.

Since 1937 the Division has been the sole importer of other citrus fruit and bananas. Its policy has been to maintain a steady but moderately priced market for fruit from the Cook Islands and Weste Samoa (New Zealand dependencies) and to secu sufficient quantities from other sources to supply t public need at the lowest prices possible witho making a trading loss. (Wholesale fruit merchan distribute the fruit to retailers on a commissi basis.) The Division succeeded in stabilizing t market, which formerly reflected alternate gluts a periods of scarcity, and maintained adequate su plies of citrus and bananas until the war interfer with imports from Jamaica and California.

WHEAT

Since 1935, a Wheat Committee has controlled N Zealand's trade in wheat. The Committee, thou not a part of the Internal Marketing Division, o erates on similar principles. It is composed of re resentatives of wheat growers, flour millers, a bakers and of the Industries and Commerce Depar ment of the Government. The Government contro all imports of wheat through the Committee, whi effects purchases through authorized brokers. T Wheat Committee also has control of the marketi of flour; the wheat grower, the miller, and the bak each selling at a fixed price. Since the price pa to growers is higher than is justified by the pri paid by bakers for the flour, a subsidy is paid to t millers to make up the difference. In spite of the measures, however, New Zealand has not yet becom self-sufficient with regard to wheat.

OTHER PRODUCTS

The Division has conducted other activities th are worthy of mention. Hops and raspberries a marketed through Boards appointed by the Minist of Marketing, which, nevertheless, act as agents fo the producers. Corn and kauri-gum producers ha been aided by guaranties that the Division wou stand ready to buy if the price fell below an agre figure. Onions and potatoes have been bought an exported when a surplus existed and imported i times of scarcity. On other occasions, the Marketin Department has imported and distributed stock fee and manures. The Division, as wartime measure has operated a butter-dehydration factory and acte as the agent for the collection of seaweed require in the manufacture of agar-agar.

Bulk-Purchase Agreements

In August 1938, the United Kingdom Governmen submitted to the Dominion Governments a detaile memorandum outlining plans for food control in th event of war. The contents of the memorandum ha

n discussed since the last half of the 1930's, when eat of another war with Germany became apent. The Government of the United Kingdom, ndful of its experiences during World War I, in 6 began planning a food program for war, by ating the Food (Defense Plans) Department—er to become the Ministry of Food—in the Board Trade. Plans were developed and at the Imperial nference in London in June of that year it was dicated to the Dominion Ministers that, in the nt of war, the United Kingdom Government ght become the sole purchaser of imported foodffs (*10*).

Meat and dairy products, under the United Kingm's memorandum of August 1938, were to be hand through long-term contracts for bulk purchases. ith reference to New Zealand's export-control sysm, the statement was made that—

re the New Zealand Government now acts as the sole porter of butter and cheese and the New Zealand Meatoducers Board regulates the shipment of meat, it would a simple matter to inaugurate both contracts in the event war.

w Zealand accepted the memorandum in prinle early in 1939 and agreed to enter into negotiaons regarding prices and quantities, should hosities commence. On September 5, 1939, official scussions started regarding the terms for purchase New Zealand butter, cheese, and meat. Within 3 onths, bulk-purchase agreements between the New aland Government and the United Kingdom Govnment had been in the main completed with regard these products, as well as to wool, tallow, woolly eepskins, hides, fruit, eggs, and scheelite.

The New Zealand Government desired the purase agreements to cover the period of the war and least 1 year thereafter. With the exception of ool, however, the contracts were eventually made an annual basis. The general understanding was at the arrangements would continue for the duraon of the war; but the terms, principally with reect to prices and quantities, were to be negotiated ch year.

Price negotiations were based on an average of ices prevailing during a recent period. The meatice schedule was based upon 1938 prices, which had en higher than 1939 prices. Since the wool agreeent provided that prices were to be reexamined nually, and since the other agreements were on a ar-to-year basis, prices could be adjusted to changg circumstances. Wool prices were increased by percent at the beginning of the 1942–43 season, nd upward revisions have been made in the prices rovided in subsequent agreements affecting other products. Because of the stabilization policy, part of these increases have not been passed on to New Zealand producers. The wool-price increase was distributed as follows: 5 percent in cash, 5 percent in Government Bonds redeemable after the war, 4 percent in cash at the end of the season, and 1 percent as subsidy to domestic wool processors. In the case of meat, pelts, and tallow, increases in prices have been retained in a Meat Pool account to subsidize local prices; maintain the returns on ewe mutton and canning meat; meet interest, storage, and insurance charges; and provide against capital liability on emergency canning plants and cool stores (*4*).

In the negotiations, the New Zealand Government indicated that price increases should be granted when the index of export prices in the United Kingdom rose 10 percent or more. While this was not accepted as one of the terms of the agreement, the movement of prices of articles that are imported into New Zealand has been an important factor in subsequent determination of price.

In August 1944, the New Zealand Prime Minister announced that the United Kingdom Government had agreed to pay to the New Zealand Government a lump sum of 12,000,000 pounds sterling ($48,420,000) and an additional 4,000,000 pounds sterling ($16,140,000) per year for the next 4 years as compensation for the abnormal increase in prices of New Zealand's imports since 1939. These funds are to be placed in stabilization accounts of the respective industries, and, after the Government has recouped expenditures on subsidies paid during the war to hold down farm costs, they will be used for the benefit of the various farm industries after consultation with their representatives.

The point of purchase has in the main been f. o. b. shipboard in New Zealand. Thus the United Kingdom has borne the increased costs of freight, insurance, and landing charges. The United Kingdom Government has also agreed to assume storage charges in New Zealand when, because of shipping shortages, goods subject to a purchase agreement must be held in stock longer than usual.

The negotiations began with the understanding that all the exportable surplus of meat and dairy produce was to be subject to the agreements. The discussions revealed that the United Kingdom and New Zealand placed a different interpretation on the phrase "exportable surplus." New Zealand understood the term to mean the total surplus production over and above its domestic requirements; the United Kingdom adopted the definition "the quantity which, having regard to available ships, could in fact be exported." The United Kingdom Government as

a buyer did not desire to commit itself to purchasing limitless quantities of perishable produce that might be stranded in the country of production. A compromise was adopted whereby the United Kingdom promised to purchase certain defined quantities of meat, butter, and cheese and to endeavor to lift any additional quantities made available for export, subject to the British supply and shipping situation. The compromise was acceptable to New Zealand, since the defined quantities covered approximately all the estimated surpluses available for export. The agreement covers all wool not desired by New Zealand processors without qualification regarding shipment.

The bulk-purchase agreements with the United Kingdom could best be handled by a system of government purchase and control in the selling country. The scope of the New Zealand Marketing Department's functions consequently has greatly expanded. The Export Division was given powers in the Marketing Amendment Act, 1939, to acquire any foodstuffs, or to fix wholesale and retail prices. Provisions were also made to finance the acquisition arrangements with the United Kingdom. As a result, the Department has extended its control over exports to all products covered in the agreements.

The war measures thus served to hasten the extension of the guaranteed-price plan for dairy products to other commodities. The original plan anticipated the inclusion of other major export products at an early date. The reciprocal-trade provision in the original act also anticipated bulk sales to export markets, and Mr. Nash spent much time in negotiations directed toward the consummation of this objective. The war cannot, therefore, be said to have caused a definite break in New Zealand policy. Rather it accelerated established trends and aided in the realization of the Government's avowed policies.

The continuation of the present program into the early post-war period was assured when, on August 3, 1944, the New Zealand Prime Minister announced before the twelfth Dominion conference of ward delegates of the New Zealand Dairy Board that the New Zealand Government had entered into a 4-year contract with the United Kingdom Government for the sale of meat and dairy products to the United Kingdom.[6] In addition to providing for the lump-sum payments previously mentioned as compensation for increases in the price of British exports to New Zealand between 1939 and 1944, the new 4-year contract raised the return on butter to 16.1 pence (21.8 cents) a pound and on cheese to 9.5 pence (12.7 cents) pound for the 1944–45 and 1945–46 seasons. Pr for the third and fourth contract year are to reviewed in the light of costs then existing.

The Prime Minister announced that the arran ments also provided for some proportionate incre in the price of meat, partly by way of an incre in the price paid per pound, and partly by way periodic lump-sum payments. Since the matter still the subject of discussions in London, the amou of the increases were not announced.

Considerations Affecting Future Policy

New Zealand's commercial policy before the was directed at "insulating" the internal econo from the disturbing effects of wide fluctuations the overseas prices of the main export products (This policy involved exchange and import control, well as guaranteed prices for, and state control export products. When these measures and oth not so directly concerned with agricultural trade taken into account, the cumulative result is a mos of bilateral and state trading, imperial preferen import and exchange restrictions, and, to a limi extent, export subsidizations. In the administrati of these policies, however, the New Zealand Gove ment sought to prevent increases in the cost of p duction of the export products that are so imp tant in the country's economy.

New Zealand is an efficient producer of its m export products and used subsidies before the w to aid its agricultural producers to a limited ext only. The subsidy to apple and pear producers, protection afforded wheat growers, and the net los under the "guaranteed price" for export dairy pr ucts were the most important subsidies. Other direct subsidies were given through freight-rate c cessions and reduced fertilizer prices.

The outstanding development of the war peri has been the general extension of the guarant price to all products covered by the bulk-sa arrangements with the United Kingdom. The agreements, when considered with the block sterling arrangements, have accentuated the bilate features of the New Zealand program. The essent features of the war program will be carried into t early post-war period as a result of the agreement the United Kingdom to continue the bulk purch of New Zealand meat and dairy products until 19

This agreement promises a secure market for of New Zealand's major export products, except wo during the early post-war period. The wool-p

[6] THE DOMINION [WELLINTON]. UNITED KINGDOM PAYMENTS FOR DAIRY PRODUCE; TERMS OF AGREEMENT ANNOUNCED . . . *In* Christopherson, Carl E., Prime Minister's Announcement of Long-Term Contracts with the United Kingdom . . . U. S. Cons. Rpt. 521, 9 pp., August 11, 1944. [Hectographed.]

se agreement runs for the duration of the war and ear thereafter. Since large stocks belonging to British Government are on hand in New Zea- d—and in Australia and South Africa as well— marketing of wool during the post-war period l be greatly influenced by the policy followed in idating these stocks. Following World War I, ilar stocks were disposed of over a period of years an Inter-Empire Board known as the British stralian Wool Realization Association. Stocks much larger at present, however, than they were n, and wool faces increasing competition from thetic products. There are groups of wool pro- ers in each of the three Southern British Do- nions who advocate the continuation of the Brit- purchase arrangement through 3 or more post- r years. Such a program would be costly to the itish Government and is opposed by the British olen interests. The magnitude of available sup- es at the war's end, however, may prevent an early urn to the uncontrolled marketing and trading ctices of the pre-war period.

By 1948 the Marketing Department will have con- lled the export of butter and cheese for 12 years, of meat products for 9 years, and of wool and other products for the war period or longer. Producer opinion with respect to the operation of existing programs will then be an important element in the determination of future policy. Although producers have complained at times about prices received for export products and about some of the programs of the Internal Marketing Division, they appear, on the whole, satisfied with the guaranteed-price policy.

New Zealand, during the pre-war period, developed an efficient agricultural-production industry yet found it necessary to intervene more and more in the marketing of the produce of that industry. On the whole, however, the country relied upon the maintenance of low production costs as the basis of its export trade and employed protective measures principally to safeguard agricultural producers from the effects of erratic changes in world prices of their export products and to protect the country from an unfavorable balance of trade. Since the agricultural industry of New Zealand is so directly dependent upon exports, it stands to benefit by an expansion of world markets as anticipated in numerous discussions and agreements of the United Nations.

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United Kingdom Wartime Policy an Post-War Program for Milk

by **DAVID D. JONES***

At the outbreak of war, there was a semi-official agency in the United Kingdom through which producers could market milk both for consumption in a fresh state and for manufacturing purposes. The Milk Marketing Board at that time handled practically all milk for use in manufacturing dairy products. It now purchases from producers and sells to the Ministry of Food all United Kingdom milk.

Production and Consumption

Farmers in Great Britain and Northern Ireland have managed to avoid a serious decline in milk production since the beginning of the war by their response to a governmental wartime program that gave milk first place among all foodstuffs because of its vital place in the national diet. The United Kingdom consumes more fresh milk at present than at any other time in its history; in fact, the present rate is 35 to 40 percent above pre-war level.

Dairy herds have been substantially increased, but it has not been possible to maintain normal output per cow. Producers have been seriously handicapped by a shortage of skilled labor, a decline in imported feedstuffs of approximately 6,000,000 long tons (2,240 pounds), and the plowing up of 7,000,000 acres of grassland. The shortage in feedstuffs has been only partially relieved through a diversion of supplies from pig and poultry producers to dairy farmers and by rationing in proportion to the amount of milk sold.

Wartime Control

The Milk Marketing Board now purchases all milk directly from producers, with payments varied according to region of production. The Board sells the milk to the Ministry of Food at prices prescribed by the latter, grade differentials being based on quality tests conducted by the Ministry of Agriculture. Finally, the Ministry of Food wholesales milk to distributors and manufacturers, again at control prices that are uniform regardless of how the commodity is utilized.

Larger quantities have been made available for consumption in the original form by the diversion of milk to fresh use from other uses that could be dispensed with or met by imports more easily than domestic production. Part of the milk formerly utilized in the production of butter and cheese, for example, has been channeled into the fluid trade. The manufacture of cream and ice cream has been prohibited, and the quantity of skim milk fed to livestock has been drastically reduced.

The wartime method of control represents a relatively easy transition from that of peacetime. Prior to 1922, milk marketing in the United Kingdom was generally unorganized. From that year until 193[illegible] much of it was directed by the Permanent Joint Milk Committee, a nongovernmental body composed of representatives of the National Farmers' Union and of the National Federation of Dairymen's Associations. After 1933, and until the beginning of the war, such activity became the responsibility of the Milk Marketing Board, recruited entirely from producers, and there was a gradual tightening of control. Both Committee and Board directed their efforts toward more efficient production and distribution of higher quality milk in greater quantities at prices remunerative to farmers and wholesalers primarily through market organization and price fixing.

Increasing competition among farmers had led to a severe fall in milk prices by 1932. This was especially true of that part of the supply sold for manufacturing purposes, which also had to compete with considerably cheaper dairy products imported from Canada and New Zealand. As a result, large quantities of such milk were sold to the fluid trade because somewhat better prices were thus obtainable. The over-all production trend continued slowly upward, however, despite the unfavorable conditions generally prevailing before the creation of the Milk Marketing Board.

From October 1933 to the end of September 1940 to meet the competition of imported milk products all milk used in manufacturing was directly subsi[illegible]

*Office of Foreign Agricultural Relations.

ed. Sales by all but the smallest producers had be made either through the Board or with the rd's approval. Farmers were thus assured of a e sufficient to cover costs of production plus a rgin of profit on all milk sold.

The country was divided into regions, and all pro- ers in a single region were paid the same price the Board or, in the case of approved sales, paid upplementary amount to bring their price up to regional level. Adjustments were made for de and quality, transportation costs, and similar ms. The equalized price received by a producer a regional pool from the Milk Marketing Board luded a subsidy drawn from Exchequer funds. is was paid to make up the difference between a aranteed price, called a "standard price," and either actual sale price of manufacturing milk or a re negotiated annually between producers and nufacturers, whichever involved the lesser amount. negotiated figure was based on the average com- itive price of cheese imported from New Zealand l Canada, and agreed upon by the Board and the ntral Milk Distributive Council. Most of the reased quantity of milk sold off farms as a result this arrangement was processed rather than used liquid form.

In the pre-war period of board control, milk pro- tion increased gradually, The trend in butter oduction, although upward, was rather irregular, l imports declined slightly but steadily. Both ese production and imports were virtually stable, oduction fluctuating more than imports. The pro- tion of condensed and powdered milk increased dually, but imports declined.

In February 1939, producers received, on an aver- , 1 shilling 3 pence (28 cents at the prevailing e of exchange) per imperial gallon (1.2 U. S. llons) for milk. During the corresponding month 1943, the price rose to about 2 shillings 6 pence cents). Prices to producers, currently reported, proximate the latter figure. Furthermore, a pre- um of 4 pence (6 cents) per imperial gallon is now ng paid for "attested" or tuberculin-tested milk m certified herds.

Official Post-War Production Goal

Assuming a policy position similar to that previously taken by the Minister of Agriculture, the Minister of Food on June 9 said:

> I want to see the National Milk Scheme continued; I want to see the milk in schools scheme continued, and I want to be able to discontinue milk rationing, as soon as possible after the war. We shall also want to manufacture in this country the maximum quantity of condensed milk, milk powder, butter, and cheese and, if we are to accomplish this, we shall need 360,000,000 gallons more milk each year to be produced in this country.

Some idea of the significance of this figure can be obtained from the fact that annual over-all milk production just prior to the war averaged almost 1,800 million gallons, of which something over 200 million gallons were fed to livestock.

By way of encouraging farmers to produce the increased quantity of milk that is likely to be required during the next 4 years, the Government, on May 25, announced its decision to guarantee prices "up to the summer of 1948" at not less than those presently prevailing, with the exception of the special wartime-production bonus paid for the current year. Moreover, actual costs above such prices are to be covered by adjustments made each year. Any future bonus, such as that for tuberculin-tested milk, will be subject to annual review before payment. The Ministry of Agriculture has estimated that it will be necessary to increase production by at least 100 imperial gallons per cow per year within 4 years to obtain the additional quantity needed.

Post-war milk supplies probably will be used largely in fresh or liquid form, according to present indications. If so, only reduced amounts will be available for manufacturing, at least for a time, and there will be a corresponding need for imported milk products. If such is the case, the control employed would require greater emphasis on consumption programs and production efficiency than in pre-war years. Prospects for milk producers in the

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United Kingdom appear to be quite promising in view of the announced policy of the Ministries of Food and Agriculture regarding increased consumption of fluid milk and milk products.

Meanwhile, the quality of milk is being steadily improved through the adoption of more sanitary methods of production and handling, lowered bacteria count, and tuberculin testing. The plan is to make "accredited" milk, or that produced under veterinary and sanitary inspection, the national standard grade. Implementing such a trend, inspecti by the Ministry of Agriculture of premises, equ ment, and production methods is superseding that local authorities. The change should result in product of higher quality and greater uniformi In seeking further to improve efficiency, the Go ernment proposes to give active encouragement the upbreeding of the nation's dairy herds by sup vising, through licensing, the widespread establi ment and operation of artificial-insemination cente

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